



## ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

**(1) First and Final Report; Petition for Distribution on Waiver of Account, (2) for Allowance of Attorneys' Compensation, (3) for Allowance of Costs Advanced; and (4) for Final Distribution [Prob. C. 10951]**

<b>DOD: 3-24-01</b>		<p><b>LAUREN JEROME SEVERSON</b>, Executor with full IAEA without bond, is Petitioner.</p> <p>Accounting is waived.</p> <p>I&amp;A: \$279,412.00 (real property, annuity)          POH: \$0 (all assets distributed)</p> <p>Executor (Statutory and Extraordinary): Waived</p> <p>Attorney (Statutory and Extraordinary): Waived</p> <p>Petitioner states the residence was sold and the assets (residence and annuity) were distributed to the four named beneficiaries:</p> <ul style="list-style-type: none"> <li>- Lauren Jerome Severson</li> <li>- Carol Ann Severson Reinitz</li> <li>- Philip Steven Severson</li> <li>- Ronald Kent Severson</li> </ul> <p>All heirs waive account and notice and ratify all acts of the administrator and acknowledge receipt of their interest in the estate.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li><b>Petitioner states an Inventory and Appraisal was filed concurrently with the Petition; however, Court records do not show that an I&amp;A was filed. Need Inventory and Appraisal.</b></li> <li><b>The estate was distributed prior to Court authorization in violation of Probate Code §§ 11620, 11640, and the estate was not properly closed pursuant to Probate Code §12200. The Court may require clarification at this time.</b></li> </ol>
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
	<b>Inventory</b> X		
	<b>PTC</b> X		
✓	<b>Not.Cred.</b>		
✓	<b>Notice of Hrg</b>		
✓	<b>Aff.Mail</b>		
✓	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
✓	<b>Letters</b> 6-6-01		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
✓	<b>9202</b>		
✓	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
n/a	<b>FTB Notice</b>		
		<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 12-20-13</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 1 - Severson</b></p>	

**Probate Status Hearing Re: Failure to File First Account or Petition for Final Distribution**

<b>DOD: 06/22/07</b>	<b>LARRY A. DONALDSON</b> , friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>CONTINUED FROM 12/05/13</b>  <b>Minute order from 12/05/13 states: The Court sets the matter for an Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to appear and imposition of sanctions in the amount of \$600.00. The Court sets a further Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to provide information to the successor administrator timely and imposition of sanctions in the amount of \$800.00. Larry Donaldson is ordered to be personally present on 01/02/14.</b></p> <p><b>Note:</b> Minute order from 07/26/13 states: Mr. Donaldson advises the Court that he filed a status statement yesterday. He further advises that the accounting is being done however he may have a conflict which may require another attorney to complete the work in this matter. The Court on its own motion accepts Mr. Donaldson's withdrawal as Executor in this matter and appoints the Public Administrator. Mr. Donaldson is directed to contact Ms. Kruthers.</p> <p><b>Note:</b> Letters of Administration were issued to the Public Administrator on 08/01/13.</p> <p><b>As of 10/01/13, the following remains outstanding:</b></p> <ol style="list-style-type: none"> <li>1. Need <b>Final Inventory &amp; Appraisal.</b></li> <li>2. Need <b>Accounting and/or Petition for Final Distribution.</b></li> </ol>
<b>Cont. from 012513, 032913, 042613, 072613, 100413, 102513, 120513</b>	<b>Notice of Status Hearing</b> filed 11/28/12 set this matter for status. Clerk's Certificate of Mailing states that the Notice of Status Hearing was mailed to Larry A. Donaldson on 10/19/12.	
<b>Aff.Sub.Wit.</b>	<p><b>Declaration of Beneficiary Laura Leonard re Probate Status Hearing – Failure to File First Account or Petition for Final Distribution filed 01/13/11</b> states: she and her brother (both beneficiaries of the estate) have made many written and verbal requests to Mr. Donaldson requesting an accounting and for their father's estate be brought to a close. Ms. Leonard states that Mr. Donaldson has ignored their requests and repeatedly failed to communicate with them regarding the estate. Ms. Leonard and her brother had an attorney, Frederick Borges, contact Mr. Donaldson on their behalf to request that he move forward with the estate. Mr. Donaldson responded that he would move forward, but has failed to do so. Ms. Leonard states that she and her brother have also made a complaint to the state bar of California regarding Mr. Donaldson's failure to act. Ms. Leonard states that after all of these efforts, Mr. Donaldson recently provided them with a sloppy, incomplete "accounting", however several years' worth of information is absent and many of the transactions are questionable. Declarant further states that she and her brother were supposed to receive a distribution in early January, but have not received anything.</p> <p><b>Inventory &amp; Appraisal, partial no. 1 filed 07/24/13 - \$1,619,273.76</b></p> <p><b>Clerk's Certificate of Mailing filed 10/08/13</b> states that a copy of the Minute Order from 10/04/13 was mailed to Larry Donaldson on 10/08/13.</p>	
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
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<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>	Continued on Page 2	
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
	<b>Reviewed by:</b> JF	
	<b>Reviewed on:</b> 12/20/13	
	<b>Updates:</b>	
	<b>Recommendation:</b>	
	<b>File 6A - Wallace</b>	

**Report Regarding Status of Estate filed 11/27/13** states: At a hearing on 07/26/13, the Court accepted Larry Donaldson's resignation as Administrator and appointed the Public Administrator. According to the 07/26/13 minute order, Mr. Donaldson advised that the accounting was being done, however a conflict that may require another attorney to complete the work has come up. No accounting has been filed. Mr. Donaldson was not returning calls to the Public Administrator, who called him weekly on Wednesdays. He finally answered a call made from a personal cell phone. At a hearing on 10/04/13, Judge Hamilton ordered Mr. Donaldson to be present at the continued hearing on 10/25/13. Mr. Donaldson did not appear on 10/25/13. The Public Administrator advised the Court that all estate assets had been liquidated and rolled into a trust, of which Mr. Donaldson is the trustee. Despite requests by the Public Administrator, a copy of the trust has not been provided. The Public Administrator is concerned about the assets considering they have not yet been accounted for in the estate.

According to the Inventory & Appraisal filed by Mr. Donaldson on 06/24/13, the estate's value was \$1,619,273.76. The Public Administrator has not been able to access the Bank of America or Security First Bank accounts. He filed and was granted an ex parte order directing financial institutions to provide access to and information regarding all accounts held by the estate or trust of the decedent. The Public Administrator has made several attempts to locate a company whereby "Person Education Publication Royalties" are paid. According to attachment 2 to the Inventory & Appraisal, future royalties will be paid to the estate. There are two timeshares listed, and the Public Administrator has asked Chicago Title to determine the status of these properties. The real property, valued at \$750,000.00 was reportedly sold for \$600,000 and the proceeds placed into a Bank of America bank account. The Public Administrator believes that Mr. Donaldson should once again be ordered to appear before this Court to account for all assets listed on the Inventory & Appraisal that he filed. He should also be ordered to provide a copy of the Trust and an accounting of those assets to the Public Administrator.



Status Hearing Re: Filing of the First Account

<b>Age:</b> 15	<p><b>CHRISTINA ROBERTS</b>, mother, was appointed Guardian of the Estate on 07/09/12. Letters were issued on 07/17/12.</p> <p><b>Minute Order from 07/09/12</b> set this matter for status re filing of the First Account.</p> <p><b>Minute Order from Status hearing regarding filing of the Inventory &amp; Appraisal on 11/16/12</b> states: Counsel informs the Court that they don't anticipate doing an inventory &amp; appraisal as nothing will be going into the guardianship estate.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p style="text-align: center;"><b><u>OFF CALENDAR</u></b></p> <p style="text-align: center;"><b>Petition for Termination of Guardianship set for hearing on 01/30/14</b></p> <p><b>Note:</b> A Special Needs Trust was established for Jennifer Roberts on 11/06/12. Counsel informed the Court that no assets would be filed in this guardianship estate at a hearing regarding status of filing the Inventory &amp; Appraisal on 11/16/12. It is unclear whether this guardianship of the estate needs to remain open based on counsel's representation that no assets will be moved into the estate. If no assets are to come into the guardianship estate, a Petition to Terminate the guardianship may be appropriate. The Court may require further information to determine whether this guardianship of the estate needs to remain open.</p>
<b>Cont. from 091313, 120613</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
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<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
	<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 12/20/13</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 7 - Roberts</b></p>	